

Invoices 3.5 User Guide



We Make Software - Ecleti.com

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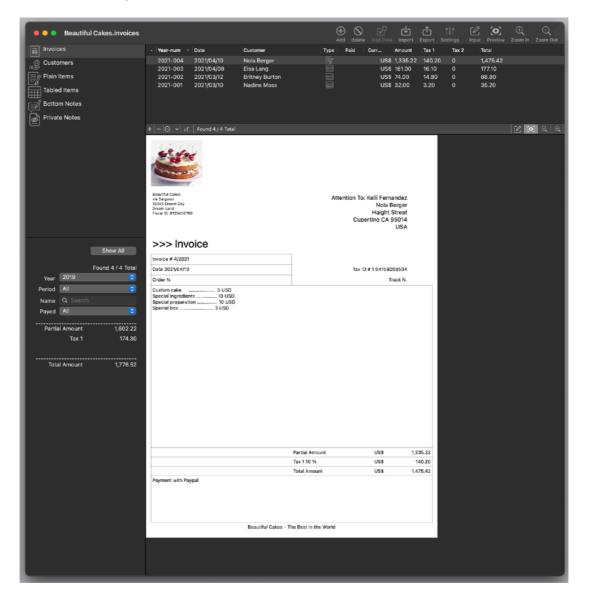
Welcome to Invoices

Invoices

Invoices is a macOS native Cocoa application to create, manage and print invoices for your business.

It was created with the small company in mind to have a simple tool responding the need many small companies have to manage their invoices creation.

A special attention is put to create a tool that can work in the correct way in any country, adapting to the different country needs and rules.



Using it you can realize invoices for one or more company with automatic creation and data insertion, with a free format or a tabular one, and print or save in pdf format invoices with your custom logo, header and footer.

Final invoices are totally customized with labels in your own language, using your currency and sales tax calculation as requested in your country.

Getting Started with Invoices

Start Using Invoices

Invoices is a document based application.

Usually a single company, to use Invoices, needs just one document only, where it can store all the data relative to all customers, products and invoices of many years of work.

It is also useful to have Invoices automatically launch at startup the document you use to store all your invoices for your company.

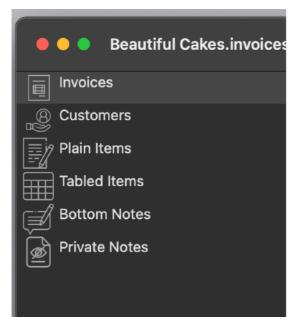
If you need to manage more then one company, you can use more then one document, one for any company you manage and makes invoices

After launching it for the first time, you can start inserting your data in a new document.

The window associated with the document has four parts:

Upper-Left

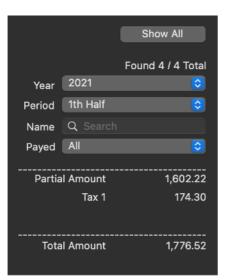
it is the 'Focus Pane' and let you select which content you can edit (as an example customers or items)



Bottom-Left

It is the 'Search Pane' and let you restrict your view searching for particular content (as an example customers in Canada)

It works also as a statistic panel with additional data displayed (total of selected invoices)



Upper-Right

It is a Table Pane with list of elements. You can select only one element at time

•	Year-num 🗸	Date	Customer	Туре	Paid	Curr	Amount	Tax 1	Tax 2	Total	
	2021-004	2021/04/10	Nola Berger			US\$	1,335.22	140.20		1,475.42	
	2021-003	2021/04/08	Elsa Lang			US\$	161.00	16.10		177.10	
	2021-002	2021/03/12	Britney Burton			US\$	74.00	14.80		88.80	
	2021-001	2021/03/10	Nadine Moss			US\$	32.00	3.20		35.20	
+	- 🖂 🖌 🗗	Found 4 / 4 Total									ଅ 🖸 ୧

Bottom-Right

It is a Detail Pane of what is selected in the Upper-Right part

Num and Date						
Date	2021/04/08	Apr 2021 🖪	• •			
#	3 Year 2021	Mo Tu We Th Fr S				I
	e Date Format in Fields	29 30 31 1 2 3 5 6 7 8 9 10				
Order N.	ge buter of nut in recost.	12 13 14 15 16 1				I
		19 20 21 22 23 24 26 27 28 29 30				I
Track N.						I
						I
Customer						I
Title						I
Name & ID	Elsa Lang (7)					
Name	Elsa Lang					
Address	Lyons Court					
Address						
City State Zip	Cupertino CA 95014					I
Country	USA					ا
Attention to:	Sallie Levine					
Tax ID # 1	24232694720					
<u>"</u> & +						
a35 +						
Goods and Se	rvices					
Invoice Type:						
# Code	Descr	MU Qt	Price		Tot	
# Code	Descr	MU QC	Price .			
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2 4 3 7	Madeira cake Gingerbread cake	Qt 5.00 Qt 2.00) 14.00) 14.00	0,0 0,0	70.00 28.00	

if you select the preview icon



inside the bottom-right view you can see a preview of the invoice

eautiful Cakes a Sargassi 1345 Dream City ream Land scal ID: 0123456789				Attention To: Sallie Levine Elsa Lang Lyons Court Cupertino CA 95014 USA						
9			т	ax ID # 1 2	4232694720 Track N					
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deira cake amisu cake		Qt Qt	2.00 5.00 3.00 2.00	14.00 14.00 9.00 18.00		28.00 70.00 27.00 36.00				
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Master and Details

Invoices uses a master and Details interface (similar to the Mail.app Apple software to read your email).

The upper-right is the master and the bottom-right is the details The left part can changes the focus of what is displayed in the right part. Example:

- If in the left you select 'Customers', in the right part you will have a list of all customers and details of the selected customer
- If in the left you select 'Invoices', in the right part you will have a list of all the invoices and details of the selected invoice

Customers

Select 'Customers' in the Selection Pane of the window Click the '+' button under the Table Pane (or in the toolbar) and a new customer will be created Edit the customer data.

Edited		Add delete Add Data Import Export Settings Input Preview Zoom In Zoom Out
Invoices	Name and ID	Address
Customers	Dolly Hendricks (51)	Jackson Street, Cupertino CA 95014 - USA
	Rafael Petty (24)	Franklin Street, Cupertino CA 95014 - USA
🚍 // Plain Items	Queen Atkinson (47)	Zan Road, Cupertino CA 95014 - USA
	Jimmie Taylor (20)	Elizabeth Avenue, Cupertino CA 95014 - USA
Tabled Items	Rosalie Haas (43)	Robinson Place, Cupertino CA 95014 - USA
Bottom Notes	Philip Burke (16)	India Road, Cupertino CA 95014 - USA
	Kerri Hardy (39)	Davis Avenue, Cupertino CA 95014 - USA
Private Notes	Nadine Moss (12)	Jefferson Street, Cupertino CA 95014 - USA
	Cory Murphy (35)	Earheart Street, Cupertino CA 95014 - USA
	Rita Barajas (8)	Meade Avenue, Cupertino CA 95014 - USA
	Elisa Casey (31)	Cherry Avenue, Cupertino CA 95014 - USA
	Charlene Fitzgerald (3)	Rugby Circle, Cupertino CA 95014 - USA
	Antonio Case (27)	Anderson Street, Cupertino CA 95014 - USA
	Dixie Hicks (50)	Greenway Road, Cupertino. CA. 95014 USA
	Lawanda Barton (23)	Cynthianna Avenue, Cupertino CA 95014 - USA
	Stefanie Arias (46)	Morgan Court, Cupertino CA 95014 - USA
	Lawrence Grant (19)	Meadowbrook Court, Cupertino CA 95014 - USA
	Letha Monroe (42)	Allied Lane, Cupertino CA 95014 - USA
	Lilia Austin (15)	Belmont Avenue, Cupertino CA 95014 - USA
	Jesus Vasquez (38)	Caroline Avenue, Cupertino CA 95014 - USA
	Roxie Bradford (11)	Rothery Road, Cupertino CA 95014 - USA
	Leola Roth (34)	St George Avenue, Cupertino CA 95014 - USA
	Elsa Lang (7)	Lyons Court, Cupertino CA 95014 - USA
Show All	Myrna James (30)	Hessian Road, Cupertino CA 95014 - USA
	Andre Moon (53)	Spring Street, Cupertino CA 95014 - USA
Found 53 / 53 Total	Gracie Mcclain (26)	Michael Place, Cupertino CA 95014 - USA
Name Q Search	Chandra Steele (49)	Douglas Avenue, Cupertino CA 95014 - USA
	Bethany Horne (22)	Green Street, Cupertino CA 95014 - USA
State/Prov Q. Search	Britney Burton (45)	Riverview Avenue, Cupertino: CA 95014 - USA
Country Q. Search	Jeanne Berger (18)	Earheart Street, Cupertino CA 95014 - USA
	Josephine Duran (41)	Rougemont Avenue, Cupertino CA 95014 - USA
	Patrice Grant (14)	Park Street, Cupertino CA 95014 - USA
	Terrence Pope (37)	Walker Street, Cupertino CA 95014 - USA
	Beatriz Norris (10)	Cabell Avenue, Cupertino CA 95014 - USA
	Rebekah Snyder (33)	Mason Street, Cupertino CA 95014 - USA
	Jessie Lindsey (6) Elico Elolos (20)	Hydraulic Road, Cupertino CA 95014 - USA

The Label Inside Your Invoices

You noticed inserting the customer data that two fields <Tax ID 1#> and <Tax ID 2#> are not with the labels you need, they just use a generic label. You can go in the preferences under the 'Invoices' menu and in the 'Label' section changing it according with the name assigned to tax in your country/state. You can also change all the other labels according with your needs and language. This labels will be used also to print your invoices in your own language.

• • Label	General Label Format Advanced Update
	Generic Tabled Items
>>> Invoice	>>> Invoice
Invoice #	Invoice #
Date	Date
Attention To	Attention To:
Order N.	Order N.
	Track N. Is to use a blank label
*Tax ID 1#	Tax ID # 1
	Tax ID # 2 Tax ID 2# in document setting according with your local tax law
**Tax 1 %	Tax 1 %
**Tax 2 %	
Use Tax 1 % and Ta	ax 2 % in document setting according with your local tax law
Amount	Partial Amount
**Tax 1	Tax 1
**Tax 2	Tax 2
Gran Total	Total Amount

You can adapt also the label of the tabled items

🔍 🔍 🔍 Label	General Label Format Advanced Update
	Generic Tabled Items
Position ID	#
Code	Code
Item Descr	Descr
Mesure Unit	MU
Quantity	Qt
Price	Price
-%	-%
Total	Tot
	Label used inside the header of the table in the tabled items invoices only. Keep them short

Adapting to your country rules

If in your country there are not sales tax, or you just need one sales tax only, you can customize it in the document settings pressing the settings button in the toolbar or from 'Settings' command in the menu



to reflect your needs, and invoices will have only the sales tax you need for your country/state with automatic calculation of totals

Text Header Image Header Footer Invoice Customer Item Form	
Currency	
Default Currency Indicator: US\$ Currency used for invoices	
Tax ID	
 Show Customer Tax ID # 1: Tax ID # 1 Show Customer Tax ID # 2: Tax ID # 2 	
Tax Calculation	
✓ Use Tax 1 Tax 1 default value % 0 Value used in new invoices	
Use Tax 2 Tax 2 default value % 0 Value used in new invoices	
Creating New	
Next Invoice Number: 5 SNumber is automatically set to 1 on year changing	
Default Invoice Type: Plain Item 📀 Type of Invoice (always	
Close	J

Items to Sell

At later time, when you will create invoices, in any invoice you will be able to choose between two type of content:

- an invoice with 'Tabled Items', prices per items, discount and quantity, all in a table format
- an invoice with a single 'Plain Item' with a descriptive content, as plain text, without items inside a table

We can now create same 'Plain items', descriptive text to put inside your invoice, as an example description of services of standard work you made for your customer, not suitable to be inserted in a invoice organized with rows of items.

Insert some 'Plain items':

- Select now 'Plain Items' from the upper-left pane.

- Press the '+' buttons and insert some items
- Edit it with a title and a content (the content will go inside selected invoices when you will request that)

Plain Items	
Tabled Items	
Bottom Notes	
Private Notes	

and now we can create a some 'Tabled Items'

- Select 'Tabled Items' from the upper-left pane.

- Press the '+' buttons and insert some items

- Edit them with a name description prices and all your data

These items are the goods or services you sell.

You can insert how many items you like.

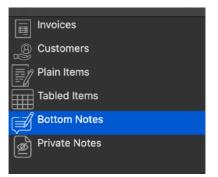
After that, at later time, when you will create and edit invoices, you will be able to insert these items in your invoices, selecting at insert time only quantity and if you like a discount to apply in the invoice, all other value will be copied from the item list and the total in the invoice will be calculated by the software, tax included.

Bottom Notes

Bottom notes are text ready to be inserted inside the bottom of your invoices. You can insert payment method, bank coordinate and other data you need to print in your invoices as reference for your customers.

Use of the bottom notes are infinite.

When you will see in details where they go inside a final invoice, you will fully understand how to use it and how to trim it for your use.



- Select 'Bottom Notes' from the Upper-Left pane.
- · Press the '+' buttons and insert some notes
- · Edit them with a name and content

Private Notes

Private Notes are, as the name suggests, private notes, for your own use. Customers won't see them in printed invoices.

You can insert inside an invoice a private note, selecting from all the available, and your customer won't see it, because it doesn't go inside the printed invoice. It is a note only for you, to remember as an example to watch for payment of this customer via different channel or to remember something you need.

You will discover yourself the right use of private note applied to your business.

	Invoices
8	Customers
	Plain Items
	Tabled Items
(Bottom Notes
۲	Private Notes

- Select 'Private Notes' from the upper-left pane.
- · Press the '+' buttons and insert some notes
- · Edit them with a name and content

Create an invoice

You created all the elements to put inside invoices, now we are at the central core function of Invoices: creating and editing a new invoice. Select from the Selection Pane the 'Invoices' item Using the '+' button in the toolbar add a new invoice



You can also use the '+' button at the foot of the invoices table



The window, in the Detail Pane will show the invoice. In the Detail Pane at any time you can switch between the 'Input' and the 'Form' view, using the button between the right-top and the right-bottom pane when focusing on invoices.

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	[O]	Q	(₽ X

The new invoice is created with the current date, the current year specification and numbered starting from 1

At any year change the numeration will restart to 1 (from the Document Setting you can choose the number used to numerate the next invoice at any time, if you need it)

The 'Number and Date' section for now doesn't need any modifications, Invoices created and filled it for you.

Insert a Customer in a Invoice

Still with 'Invoices' selected in the Selection Pane, and our new invoice selected in the Table pane, we will insert a customer inside the invoice

• Scroll the invoice Detail Pane and see there are different areas in it. Inside the invoice Detail pane (in Input view), in the 'Customer' area (scroll if you

don't see it) press the '+' button. A panel will slide out. The panel has different tabs, it is already with the Customer tab selected because you invoked it from the customer section.

- Inside the panel select the different customer and select one, pressing 'Insert Customer' will insert these data inside the invoice.
- Press now the 'Close' button.

The invoice now has inside the data of the chosen customer

	-	Custom	ner	ltems	Bottom N	ote	Private Note		
Q	Search								
	ame & ID	11063-10							
	afael Pett		•,						
Q Ji R P K	ueen Atki immie Tay osalie Haa hilip Burka erri Hardy adine Mos	inson (4 /lor (20) as (43) e (16) / (39)	7)						
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		intry: U	SA						
		D#115	561859	4372					
		ntion: O	scar N	oble					
	Close						Insert	Customer	

Insert Items in a Invoice

- Inside the invoice Detail pane scroll down now to the items area, you can see there is a popup with 'Plain Item' and 'Tabled Item', select the 'Tabled Item' option
- You can see the area below will mutate in a table. Pressing the '+' under the table will slide out the panel, this time already selected on 'item' It will show all the items we previously inserted in our 'items' area, ready to be inserted.
- Select the item and quantity for any item and press the 'Insert Item' button for any item you need inside your invoice.
- · When you have finished press 'Close'

Note that the application has upgraded as you insert new items the total inside the invoice, tax included if you insert a % value for the tax

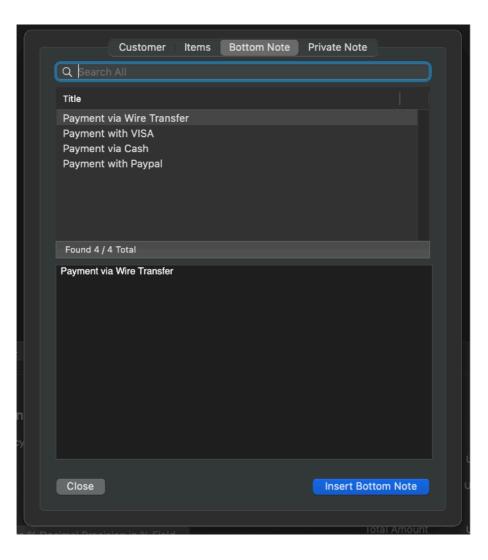
If you don't need one or both two Tax rows (according with your local regulation) you can select from the 'Settings' area to use or not the Tax 1 and Tax 2.

All your invoices will be made according with this settings and tax calculation will consider also this in performing the total of the invoice.



Bottom Notes

- The final touch to your invoice is to add a Bottom Note and if you need it a private note simply pressing the '+' button and selecting from the list.
- After that you can select above the invoice the tab to switch from the 'Input' area to the 'Form' area to see how your invoice will be printed

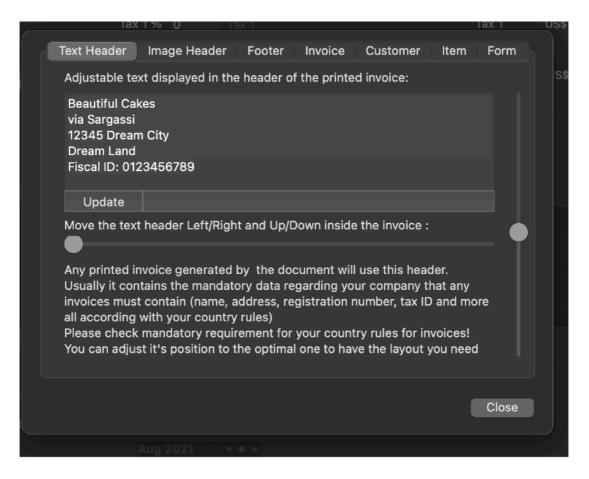


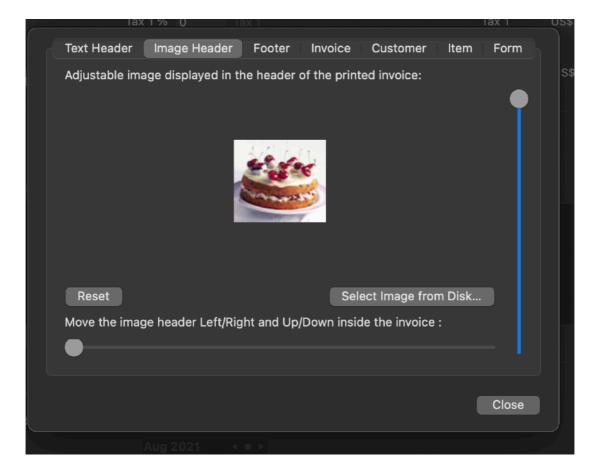
Standard Header and Footer

The upper part of the invoice in the 'Form' area can be customized with a text header and a picture. Another text can be added as footer All will be common to all your invoices form

They are usually used for company data and logo.

- Press 'Settings' and using the tabs insert a header, a company info and a bottom for your invoice.
- · Close the Settings dialog





Iax	0	lax 1		a territoria de la centra de territoria.	an an ann an Brian Br	lax I	US\$
Text Header	lmage Heade	r Footer	Invoice	Customer	ltem	Form	
Company Foo	ter						S
Beautiful Cak	es - The Best ii	n the World					
Update							
						Close	
	Aug 2021	< 0 >					

Now the form will show your company data for any invoice in the document. If you need to manage more than one company, simply use a separate document for any company you run with customized settings for any document.

In any document you can manage an unlimited number of customers, items, invoices and years of activity.

It is common to use one single document to manage all the invoices of a company for many years of invoicing. It is also useful if you use just one document, to have it automatically opened at startup

Experimenting with a demo document

Using a demo document with already data and various invoice inside already can help you to better understand how to work with Invoices

You can download it from our site.

To visit our site you can simply select 'Web Site' from inside Invoices, under the Help menu or also opening the Invoices About Box under the application menu.

When inside our site please visit the 'Download' section and look inside the download section for 'Examples for Invoices'

Invoices Reference

Introduction to Invoices

Invoices is a Cocoa native application for macOS designed to create, manage and print the invoice of your company

Invoices has a simple interface, is powerful and uses the last Apple technologies, as an example to manage the archive on disk it uses Apple Core Data based on the native SQL engine included with any Mac with MacOS.

You can trust Invoices and you can adopt it because is based on a rock solid and here to stay technology

Any data is stored on disk using the SQL technology inside MacOS.

Invoices manages all the data from the SQL file internally, you don't need to know SQL to use Invoices.

Invoices is easy and simple to use. it was realized with the final user in mind, all the complexity is managed internally, Invoices stores its internal data using the best technology available for data, thank to the incredible Core Data technology available in MacOS which brings SQL internally in the core of any Cocoa Mac software

Interface

Invoices is a document based application

You can manage and create as many documents as you like, also if you need often just one.

In any document Invoices let you manage an unlimited number of customers, invoices, items and data for an unlimited number of years of invoicing activity.

As in any other common Mac application, a document is associated with a file on disk. Inside this file are stored all the database tables Invoices uses to manage the data.

In a document window there are four panes:

• • • Beautiful Cakes.invoices				⊕ ⊗ Add delete	Add Data	لط Import	C Export s	†¦¢ Settings	Input Preview	⊕ Zoom In	Q Zoom Out
Invoices	• Year-num ~ Date	Customer	Туре	Paid	Curr	Amount	Tax 1	Tax 2	Total		
브	2021-004 2021/04/10	Nola Berger	E			1,335.22			1,475.42		
Customers	2021-003 2021/04/08	Elsa Lang				161.00	16.10	ō	177.10		
Plain Items	2021-002 2021/03/12	Britney Burton				74.00	14.80		88.80		
Tabled Items	2021-001 2021/03/10	Nadine Moss			US\$	32.00	3.20		35.20		
⊡∄ Bottom Notes											
Private Notes											
	+ - 🕀 🖌 🗗 Found 4 / 4 Total						_			20	વિચ
	Beautiful Cakes via Sargassi		Att	tention To:	Kelli Ferna						
	via Sargassi 12345 Dream Gity Dream Land Fiscal ID: 0123456789				Nola Be Haight S	erger treet					
				Cupe	ertino CA 9						
Show All	>>> Invoice										
	Invoice # 4/2021										
Found 4 / 4 Total	Date 2021/04/10]	Tax ID	#10415920	19534					
Year 2019 C	Order N.				Tra	ack N.					
Period All	Custom cake										
Name Q Search	Special preparation										
Payed All 🖸	apecial box 3 030										
Partial Amount 1,602.22											
Tax 1 174.30											
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Total Amount 1,776.52											
			Partial Amount		US\$	1,3	35.22				
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		Beautiful Caker T	he Best in the World								
		Seautiful CanES - 1	The best in the world								

The [upper-left] 'Focus Pane' let you select which content you can edit (as an example customers)

The [bottom-left] 'Filter Pane' let you restrict your view searching for particular content (as an example customers in Canada) or see statistical data.

The [upper-right] 'Table Pane' show a table with the content as specified in the previous two panes (as an example the list of all the customers in Canada) The [bottom-right] 'Detail Pane' show the single element selected in the (upper-right) above area (one specific customer of in Canada) in details

The [upper-right] 'Table Pane' and [bottom-right] 'Detail pane' are part of what is usually referred as a 'master and detail' interface (similar to the Mail.app Apple software to read your email).

If the [right] part is a master and details interface, the [left] part changes what the [right] master and details interface displays.

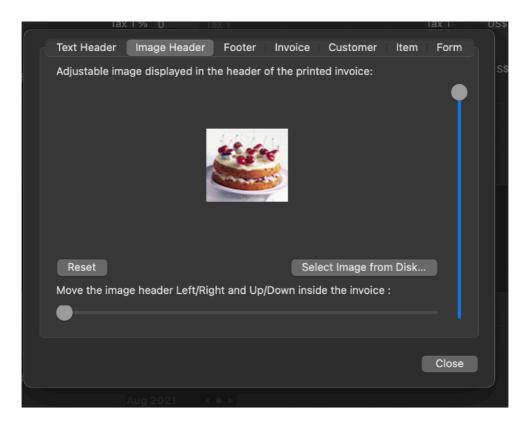
You can select from the [left] part what to focus on:

Invoices	All the invoices inside your document
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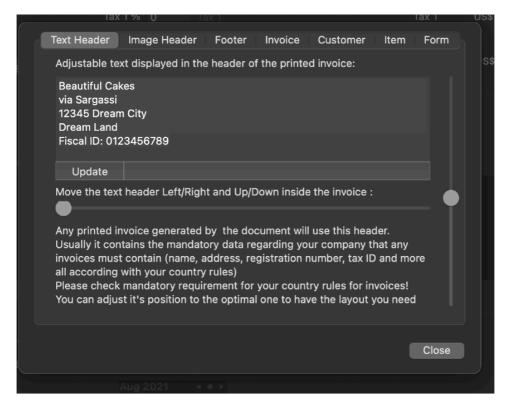
Customers	All the customers data, used to insert a customer as the receiver of a new created invoice. You need to create customers in advance, then you can create invoices using one of this customer
Plain items	The text description of the good/service sold to the customer, ready to be inserted in a new created invoice (for an invoice with single Plain Item) You need to create plain items in advance, then you can create invoices using one of these plain items You can also edit the description of goods and services directly inside a new created invoice
Tabled items	Goods/services to be inserted in a new created invoice presenting a table data of items sold (for an invoice with Tabled Items) <i>You need to create tabled items in advance, then you can create</i> <i>invoices using these tabled items with prices and total calculation</i>
Bottom Notes	Notes to be inserted in the bottom of the invoice, usually with payment method and other info you like to have in a invoice You need to create plain items in advance, then you can create invoices using one of these plain items You can also edit the description of goods and services directly inside a new created invoice
Private Notes	Notes not visible inside the printed invoice, useful only for you and not for the customer receiving the invoice

Settings

Settings allows you to set: Head image for printed invoices



Header company data or common text:



Footer company data or common text:

 Iax	(1%) ()	ax 1				lax i	05
Text Header	lmage Header	Footer	Invoice	Customer	ltem	Form	
Company Foo	ter						
Beautiful Cak	es - The Best in t	he World					
Update							
					1	Close	

Invoices custom data:

Text Header Image Header Footer Invoice Customer Item	Form
Currency	s
Default Currency Indicator: US\$ Currency used for invoices	
Tax ID	
Show Customer Tax ID # 1: Tax ID # 1 Show Customer Tax ID # 2: Tax ID # 2	
Tax Calculation	
☑ Use Tax 1 Tax 1 default value % 0 Value used in new invoice	es
Use Tax 2 Tax 2 default value % 0 Value used in new invoice	25
Creating New	
Next Invoice Number: 2	changing
Default Invoice Type: Plain Item 💸 Type of Invoice (always	
	Close

Use or not the Tax ID # 1	
Use or not the Tax ID # 2	
Use Tax 1 in calculation of total	
Use Tax 1 in calculation of total	
The next invoice number	

The default invoice type (with plain or tabled items) when a new invoice is created $% \left({{\left[{{{\rm{T}}_{\rm{T}}} \right]}_{\rm{T}}}} \right)$

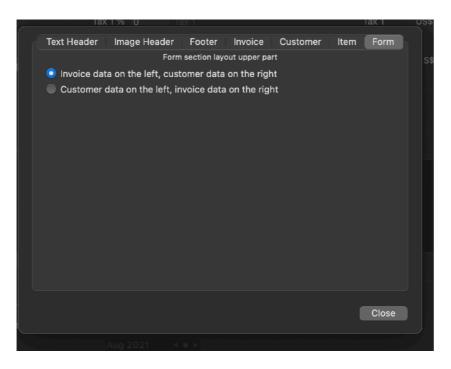
Customer default data:

e e e e e e e e e e e e e e e e e e e	1ax 1 % 0	lax 1				axi	05
Text Heade	er Image Header	Footer	Invoice	Customer	ltem	Form	
Creating Ne	ew						s
Next Cu	stomer ID: 54	Number allo	ws customer ID) difference using s	same name		
Default Val	ue in New Created Cust	omer					
City:	Cupertino						
Zip:	95014						
State:	CA						
Country	: USA						
						Close	

Item default value plus other data:

r								034
Text H	eader	Image Header	Footer	Invoice	Customer	Item	Form	h
Defaul	t value in r	new Created Items						S\$
۱ 📀 ۱	Next Cod	e (incremented):	10					
• C	Default C	ode (static):						
	C	Default Quantity:	1,00		Allows Decim	al Quant	ity	
		Measure Unit:	Qt					
							Close	

Position of object in the printed invoice (Form View)



Useful to have labels in the correct position for invoice shipment via traditional mail services.

Type of invoice

Invoices application let you create two different type of invoices. The difference is on how the good/services are inserted and listed inside the invoice and in how there are visualized inside the printed invoice.

You don't have to decide the type of the invoice before you create it, you can change an invoice from one type to the other as long as you delete the previous goods description inside that invoice.

The two type of invoice (regarding how goods are managed) are:

- Tabled Item Invoice (an item per row inside the invoice)
- Plain Item Invoice (a single long text description of goods and service)

These two type are alternative. For any invoice you can choose which one to use.

You can have inside a document invoices using different methods. You just can't have both method for the same single invoice

If goods/service are inserted using one type inside an invoice, the invoice type can be switched to the other one if you don't remove goods/services listed inside the invoice.

This is a feature, not a limitation, to prevent you changing type of invoice in an invoice with previous goods/services disappearing because you switched type and visualization!

In the list of the invoices you have inside your document the invoices are listed together regardless of their type (Plain Item or Tabled Items)

In the invoice table an icon visualize the kind of goods inserted (Plain Item or Tabled Items)

The tabled item invoice type

An invoice with tabled items has a table containing many items presented row by row.

The items are inserted from the tabled Items database, total amount of the invoice is calculated by the software

Goods and S	ervices				
Invoice Type:					
# Code	Descr	MU	Qt Price		Tot
1 2	Tiramisu cake	Qt	3.00 9.00	0,0	27.00
24	Madeira cake	Qt	5.00 14.00	0,0	70.00
37	Gingerbread cake	Qt	2.00 14.00	0,0	28.00
4 6	Birthday cake	Qt	2.00 18.00	0,0	36.00
+ - Change	e Tabled Items Labels 4				

To revert to a 'Plain Item Invoice' you need to delete all the items previously inserted in the invoice and select the popup to change from 'Tabled Items' to 'Plain Item'

When the table is not empty the popup to change invoice type will be grayed out. Deleting all the entries will enable the popup menu

Goods and Plain Item		
Invoice Type: 🗸 Tabled item	ns Empty the content if you need to change invoice type	
# Code Descr	MU Qt Price	Tot

When in 'invoice form mode', or printed, the invoice will show the items in a tabular format

Beautiful Cakes via Sargassi 12345 Dream City Dream Land Fiscal ID: 0123456789		At	Jef	o Mcphersor Nadine Moss ferson Stree no CA 95014 USA	5 t 1
>>> Invoice Invoice # 1/2021 Date 2021/03/10			Tax ID # 1	9048492500	
Order N.				Track N	
# Code Descr 1 3 Aranygalu 3 8 Welsh cak 2 5 Orange and		MU Qt Qt	Qt Pric 1.00 12.0 1.00 12.0 1.00 8.0		Tot 12.00 12.00 8.00
		Partial Amount		US\$	32.00
		Tax 1 10 %		US\$	3.20
Payment with VISA		Total Amount		US\$	35.20
	Beautiful Cakes - Th	e Rest in the Wor	ld.		

The plain item invoice type

An invoice with a plain item description has simply unique text field where you can type the text you like describing the goods and services sold (you can also insert it from the Plain Items already available)

Goods and Services	
Invoice Type: Plain Item Empty the content if you need to change invoice type Tabled items	
Use Option-Return to insert New Lines	

Total of the invoice is inserted manually

To revert to a 'Tabled Item Invoice' you need to delete all the text inside the related field and select the popup to change from 'Plain Item' to 'Tabled Items'

When printed the invoice will show the invoice with a textual description of goods and services in the invoice

As when in tabular mode, also when in plain text mode, to change type of invoice to tabular one to insert tabled items, it is not possible to change invoice type if the text area contains text.

When the text area for goods/services is not empty the popup to change invoice type will be grayed out.

Goods and S	Services		
Invoice Type:			Empty the content if you need to chang
Special prepara	ents 10 tion 1	0 USD	

Deleting all the text inside the area will enable the popup menu

Invoice with Plain Item will display when in Invoice form view or when printed it's Goods/Services inside a text area as inserted

+ - 💬 🗸 占 🛛 Found 5 / 5 Total			
1 - 1 - 1			
at and			
Comment			
Manager 1			
Beautiful Cakes			
via Sargassi 12345 Dream City			
Dream Land Fiscal ID: 0123456789			
>>> Invoice			
Invoice # 1/2021]		
Date 2021/08/08	1	Tax ID # 1	
Order N.	1	Track N.	
Custom cake			
Special preparation 10 USD			
Special box 3 USD			
	Partial Amount	US\$	0
	Tax 1 0 %	US\$	0
	Total Amount	US\$	0
Beautiful Cakes - T	he Best in the World		

Customer View

To work with the customer list inside your document select 'Customers' from the [upper-left] Selection Pane

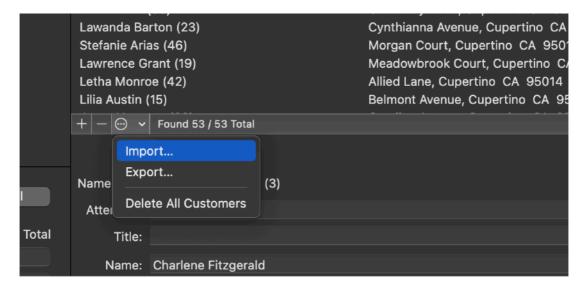
To add a new customer use the toolbar command or the '+' button below the customer Table Pane in the [top] [left] area

To edit a customer simply modify its data in the fields in the Details Pane After that all the customers in the document will be ready to be inserted as receiver of any new created invoice

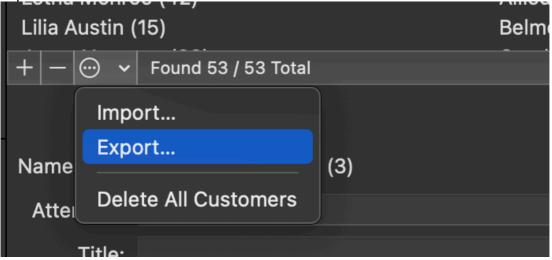
Beautiful Cakes.invoices		🕀 🚫 🗗 🄄 🖆 🛉 🎁 😰 📀 🗨 📿
Invoices	Name and ID	Address
Customers Plain Items Tabled Items Bottom Notes Private Notes	Dolly Hendricks (51) Rafael Petty (24) Queen Atkinson (47) Jimmie Taytor (20) Rosalie Haas (43) Phillip Burke (16) Kerri Hardy (39) Nadine Moss (12) Cory Murphy (35) Rita Barajas (8) Elisa Casey (31) Charlene Fizgerald (3) Antonic Case (27) Dide Hicks (50) Lawanda Barton (23) Stefanie Arias (46) Lawance Grant (19) Letha Monroe (42) Lilia Austin (15)	Jackson Street, Cupertino CA 95014 - USA Franklin Street, Cupertino CA 95014 - USA Zan Road, Cupertino CA 95014 - USA Elizabeth Avenue, Cupertino CA 95014 - USA Robinson Place, Cupertino CA 95014 - USA India Road, Cupertino CA 95014 - USA Davis Avenue, Cupertino CA 95014 - USA Eartheart Street, Cupertino CA 95014 - USA Eartheart Street, Cupertino CA 95014 - USA Meade Avenue, Cupertino CA 95014 - USA Cherry Avenue, Cupertino CA 95014 - USA Rugby Citefe, Cupertino CA 95014 - USA Anderson Street, Cupertino CA 95014 - USA Meadowbrook Court, Cupertino CA 95014 - USA
Show All Found 53 / 53 Total Name Q. Soarch State/Prov Q. Search Country Q. Search	+ - - Found 53 / 53 Total ID: 3 Name & ID: Charlene Fitzgerald (3) Attention: Tonya Shaffer Title: - Name: Charlene Fitzgerald Address: Rugby Circle Citly: Cupertino Zip: 95014 State(Prov: CA Country: USA Tax ID # 1 66825193843 Tax ID # 2 - Email: dfgbq39@hotmail.com Web: - Phone: 2691985564 Tax I % Override: - Tax 2 % Override: -	TAX 10 1 TAX 10 2 Tax 1 % Tax 1 % Tax 2 %

Customers Import

Customers can be imported inside Invoices from other sources using standard formats.



Selecting 'Import Customers' you will select which file to import in the successive dialog and where to import each field using a popup menu associated to each file to import.



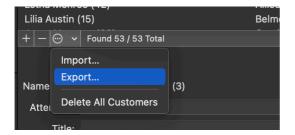
Pressing import will import the data inside the internal Customers records ready to be used.

File to import can be in TSV (tab separated values) or CSV (comma separated values)

Invoices can manage in an automatic way different encoding, also from Microsoft Windows.

Customers Export

Customers can be also exported using standard format.



Select Export from the popup button then you just need to specify which fields to export and the format to use.

Corv Murphy (35)	Farheart St	reet Cupertino CA 95014 - USA
Available Field		Exported Field
Zip		ID
State/Prov		Attention
Country		Title
TAX ID 1		Name
TAX ID 2		Address
Email		City
Web		
Phone		
	Add >	
	Remove <	
	Add All >	
III 8 not exported fields	Remove All <	▲ ↓ □□ 6 exported fields
53 records on 6 fields will be exported		Cancel Continue

You have many formats available.

- Tab Separated Value
- Comma Separated value with Quotes
- Comma Separated value no Quotes
- HTML table
- HTML Page with Table

 Charlene Fitze	gerald (3)	Ruaby Circ	le. Cupertino CA 95014	- USA	
	Save As:	Beautiful Cakes Custor	mers Export.1		
	Tags:				
	Where:	🗧 Beautiful Cakes Den	no 🜔 🗸		
Export Format:	Custom				ith field name
Start of File:		In fields u	use \n for newline and \t f	or tab	Template: 🔽
					TSV
Start of record:	Field open tag	Field close tag:	Field separator:	End of	CSV with Quotes
					CSV no Quotes
End of File:					HTML Table
			🗹 🛛 Use En	d of Recc	Html Page with Table
			•	Cancel	Reset Fields
City: (

It is even available a custom format to use where you can specify almost all regarding the format layout to use to export

Exported customers can be used in any application able to handle and import data in these standard formats

Plain items view

To work with the plain items inside your document select 'Plain Items' from the [upper-left] Focus Pane

To add a plain item use the toolbar command or the '+' button below the Table Pane To edit a plain item simply modify its data in the fields in the Details Pane

After that all the plain items in the document will be ready to be inserted as the good/service of any new created invoice with just a click.

Note that the the item is copied inside an invoice, not linked.

This feature allow to maintain an invoice at the state it was also if you change the item description at later inside the items section of the document.

This is correct because an invoice it's a static item, not subject to change, after you created it, printed it and sent it to your customer.

Beautiful Cakes.invoices Edited		⊕ Add		Add Data			င်္ခု နဲ မှ Settings		⊕ Zoom In	Q Zoom Out
	Bodynotes Title									
(B) Customers	Custom cake									
Plain Items										
Tabled Items										
Bottom Notes										
Private Notes										
	+ - 💬 🗸 Found 1 / 1 To	tal								
		7101	_		_	_		_	 	_
	Plain Item Title Custo	m cake								
	Custom cake		5 USD							
	Special ingredients Special preparation		0 USD							- 11
Found 1 / 1 Total	Special box		3 USD							- 11
Title Q										- 11
										- 11
										- 11

Tabled items view

To work with the tabled items inside your document select 'Tabled Items' from the [upper-left] pane

To add a tabled item use the toolbar command or the '+' button below the table area To edit a plain item simply modify its data in the fields

After that all the plain items in the document will be ready to be inserted as the good/service of any new created invoice

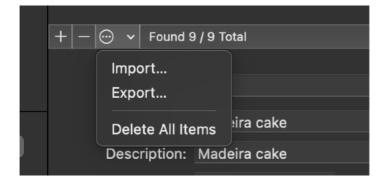
Note that the the item is copied inside an invoice, not linked.

This feature maintains an invoice at the state it was also if you change the tabled item description and price at later inside the tabled items section of the document.

Beautiful Cakes.invoices Edited		Hdd delete Add Data	Import Export Settings	Input Preview Zoom In	Q Zoom Out
	Code1	Name	Available Date	Unit Sell Price	Buy Price
Customers	1 2 3	Sultana Tiramisu Aranygaluska	01/22/19 01/22/19 01/22/19	Qt 12.00 Qt 9.00 Qt 12.00	
Tabled Items		Madeira cake	01/22/19	Qt 14.33	
Bottom Notes Private Notes	5 6 7 8 9	Orange and polenta cake Birthday cake Gingerbread Welsh cake Punschkrapfen	01/22/19 01/22/19 01/22/19 01/22/19 01/22/19	Qt 8.00 Qt 18.00 Qt 14.00 Qt 12.00 Qt 10.00	11,00
	+ - © • Found	9 / 9 Total			
	Code: Name:	4 Madeira cake			
Show All	Description:	Madeira cake	Copy from Name		
Found 9 / 9 Total	Sell Price:	14.33 (US\$) Buy	(US\$)	
Code: Q Name: Q	Mesure Unit: Note:	Qt A	llows Decimal Qt D	efault Qt: 25.00	
Description: Q Available: All 🜍	Available:	✓ Now From: 22/ 1/201			

Tabled item import

Tabled items can be imported inside Invoices from other sources using standard formats.



Selecting 'Import' from the popup button at the bottom of the tabled items list, then you will select which file to import in the successive dialog and where to import each field using a popup menu associated to each file to import.

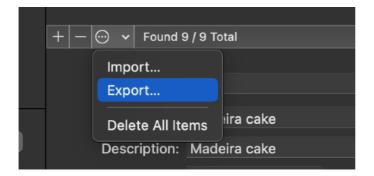
Pressing import will import the data inside the internal tabled Items records ready to be used.

File to import can be in TSV (tab separated values) or CSV (comma separated values)

Invoices can manage in an automatic way different encoding, also from Microsoft Windows.

Tabled Item Export

Tabled Items can be also exported using standard format.



Selecting 'Export' from the popup button at the bottom of the tabled items list , then you just need to specify which fields to export and the format to use.

	Codel	Name		Available Date		Sell P
						00
Available Field				Exported Field		.00
Allows Decimal				Code		22
Default Quantity	/			Name		.33)0 .00
Note				Description		
Available				Sell Price		.00
Available Date				Buy Price		.00
				Measure Unit		.00 .00 .00
						.00
		Add	>			
		Remove	<			
			_			
		Add All	\geq			
💷 5 not exporte	ed fields	Remove All	<	▲ ♣		
9 records on 6 fie	elds will be exported			Cancel	Continue	IS
				Guilder		- Jo

You have many formats available.

It is even available a custom format to use where you can specify almost all regarding the format layout to use to export

		Агапудаіцяка	01/22/19	Qt 12.00
	Save As:	Beautiful Cakes Items Expo	ort.tsv	
	Tags:			
	Where:	📄 Beautiful Cakes Demo		
I Export Format:	 Tab Separated Value Comma Separated V Comma Separated V Html Table Html Page with Table Custom 	alue with Quotes alue no Quotes	●) ≔ ● Fill first red	cord with field name
			Car	ncel Save

Exported tabled items can be used in any application able to handle and import data in these standard formats

Bottom notes and private notes view

Select it from the [upper-left] pane

Add using '+' from the toolbar or below the table end further edit them if you need. Also these are copied when inserted inside an invoice

This feature maintains an invoice at the state it was also if you change the used note at later inside the notes section of the document.

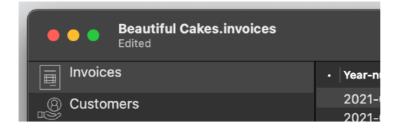
Beautiful Cakes.invoices Edited		⊕ Add	O delete			[] Input		Q Zoom Out
🔲 Invoices	Notes Title							
Customers Plain Items Tabled Items Bottom Notes Private Notes	Payment via Wire Transfe Payment with VISA Payment via Cash Payment with Paypal	ər						
	+ Found 4 / 4 T	Total						_
	Note Title: Payment v Payment via Wire Transf	/ia Wir	re Transf	fer				
Found 4 / 4 Total								

Creating and editing invoice

Select 'Invoice' from the [upper-left] Selection Pane To add a new invoice use the toolbar command or the '+' button below the Table Pane [upper-right]

Editing invoice content

Any invoice is edited form the Invoice input section To access the Invoice input section select Invoice form the upper left list

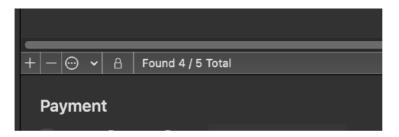


then select the input view from the 'Input View/Form View' switch buttons located on the bottom right part of the invoice list.



When in the Input View area, you can edit a new created invoice

Note that if an invoice is locked you need to click back the lock to unlock it to edit it again



The lock will change it's state

+	-	\odot	~	പ്	Found 4 / 5 Total
	Pay	ymo	ent	t	

The Invoice Input Area is divided in sections

In an invoice section you can insert content:

- editing it directly in place

or

- using the data you inserted in other 'sections' of the document

When you select 'Invoices' from the [upper-left] Focus Pane in the [upper-right] table you see all the the invoices in your document (or a restricted set if you used a search set in the bottom-left).

The selected one in the table is displayed in the [bottom-right] Detail Pane The Invoice can be visualized in two ways:

- Input

- Form

In the 'Input' method you can edit the invoice, in the 'Form' you see the invoice as it will be printed

You can switch from the two mode pressing the buttons at any time



When in 'Input Mode' pressing the '+' button in the various sections

Customer	r	
Title		
Name & ID	Nadine Moss (12)	
Name	e Nadine Moss	
Address	S Jefferson Street	
City State Zip	Cupertino CA 95014	
Country	y USA	
Attention to:	Julio Mcpherson	
Tax ID # 1	1 90484925001 (Tax ID 1)	
B +		

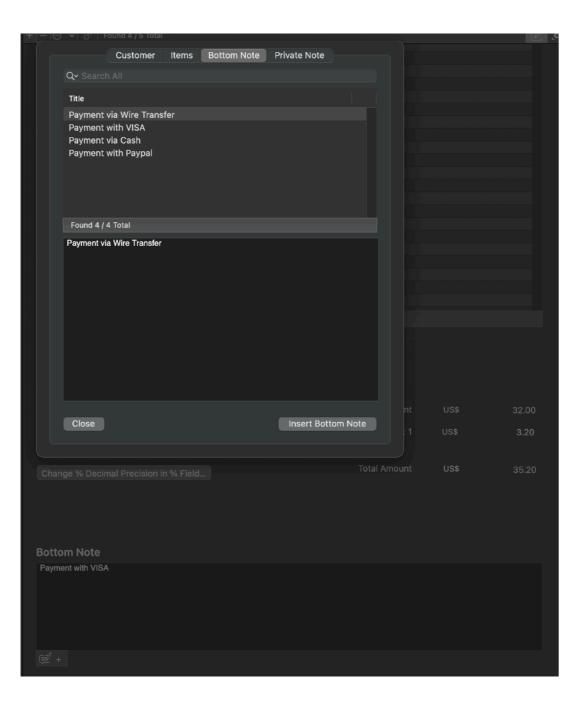
will open a panel that let you insert content inside the invoice from pre-realized content inside the various list of the documents

- Customers
- Plain Items
- Tabled Items
- Bottom Notes
- Private Notes

The insertion is realized via a Panel sheet with different tabs

	ound 4 / 5 To	lai			
(Customer	ltems	Bottom Note	Private Note	
Q Search					
Name & ID					
Doily Licht					
Rafael Pet					
Queen Atk Jimmie Tay					
Rosalie Ha					
Philip Burk					
Kerri Hard					
Nadine Mo	oss (12)				
Found 53 /	53 Total				
	& ID: Phili	p Burke (16	5)		
	lress India	a Road			
		ertino CA 9	5014		
	untry: USA				
		1651327			
		1001027			
	ntion: Cele	ste Leonar	d		
Close				Insert	Customer

Note that when you select a different tab in the dialog panel, the input area in the below main window will scroll to show the relative ara that will receive the input if you press 'Insert'



Invoice Input Sections

We now examine the various sections of the invoice and how to fill them with required data when after creating a new invoice.

Num and Date section

In the invoice input area we find the Num and Date section to insert a unique number identifying your invoice and it's date

When you create a new invoice it is set with the current date. You can change it after creation

It gets also a sequential number. Any time an invoice is created the sequential number is incremented.

You can change the current sequential number (used to create the next new invoice adding +1) in the document settings.

At any year change the sequential number is rested to one.

Invoices manages to create in that way uniques year/serial number series as many country states requires to univocally identify invoices over time.

You can also manually insert an order number and a track number to be indicated in the invoice for you and your customer convenience.

Num and Date										
Date	2021/03/10)		Ma	r 2	021			• •	• •
	1	Vear	2021	Мо	Tu	We	Тh	Fr	Sa	Su
#		real	LOLI		2		4	5	6	
Chang	e Date Forn	nat in F	ields	8	9		11	12	13	14
				15	16	17	18	19	20	21
Order N.				22	23	24	25	26	27	28
Track N.				29	30	31				
Hack N.										

Customer Section

The customer section contains the date of the customer receiving your invoice. You can't edit it directly inside the customer section.

You can only insert a customer you already have inserted inside your Customer list

Customer	
	Nadine Moss (12)
	Nadine Moss
	Jefferson Street
	Cupertino CA 95014
	USA
	Julio Mcpherson
	90484925001 (Tax ID 1)
8 +	

Inserting a pre-made customer inside the customer section of an invoice

To insert a customer already in the list simply press the '+' button at the bottom of the Customer section.

Custo	omer Items	Bottom Note	Private Note	
Q Search				
Name & ID Elsa Lang (7) Myrna James (30 Andre Moon (53) Gracie Mcclain (2 Chandra Steele (Bethany Horne (2 Britney Burton (4	26) 49) 22) 5)			
Found 53 / 53 Tota	I			
	Bethany Horn	e (22)		
	Green Street			
	Cupertino CA	95014		
	USA			
	0149866038	7		
	Leo Rivers			
Close			Insert	Customer

Inside the customers dialog you can search for a particular customer using the upper search field inside the dialog

The content of the list will be filtered out according to the search field.

	Customer	Items	Bottom Note	Private Not	e
Q rosa					8
Name & ID					
Rosalie H	aas (43)				
Found 1 / 5					_
	Title: No Se				
	untry: No Se				
	ID # 1 No Se	lection			
		lection			
		Tax 1 %		Tax 2 % No	
Close					

To insert a customer inside the current invoice select it and press 'Insert Customer'

Customer data are copied inside an invoice, not linked.

Further changes in the customer are to this customer are not mirrored inside the invoice using this customer. So the invoice maintains it's state over time also if you update the database used to input its values

Goods and Services section

Goods and Services section is probably the more complex section. It contains the description of the goods and service you sell In this section the first step is to select the type of representation for this invoice of goods/services you sell (via a popup button inside the section)

You can have a plain description or a tabular description



In case of the plain description you will have a text area where you can click your cursor and insert the description of the invoice manually

or

insert it from pre-created from the list of the 'Plain Items' you have inside your document (see below Insert a Plain Item)

If you select from the popup button Tabled Items, you can only insert from a list of pre-created Tabled Items

Goods and	Services						
Invoice Type:							
# Code	Descr	MU	Qt	Price		Tot	
18	Welsh cake	Qt	1.00	12.00	0,0	12.00	
25	Orange and polenta cake	Qt	1.00	8.00	0,0	8.00	
33	Aranygaluska cake	Qt	1.00	12.00	0,0	12.00	
4 2	Tiramisu cake	Qt	1.00	9.00	0,0	9.00	
+ - Chang	ge Tabled Items Labels 4						

In the case of tabled items you can add and remove elements using the buttons at the bottom of the table.

If you use tabled Items to insert goods/services total amount will be updated according to the price and quantity of the items inserted.

In case of Plain Items, the total amount of the invoice is left untouched and you have to insert it manually.

If you want to change the invoice form tabled Items to plain item, you have to cancel the previous inserted items or text.

Inserting a pre-made plain item inside the goods and service section of an invoice

To insert a plain item inside the goods and service section you need to press the '+' button at the bottom of that section

You can insert a plain item only according with your selection in the 'Invoice Type' popup (inside the 'Invoice Input View')

To change the selection in the 'Invoice Type' popup you need to empty the items already inserted in the invoice if any.

Plain item data are copied inside an invoice, not linked.

Further changes in the item are not mirrored inside the invoice using this item. So the invoice maintains it's state over time also if you update the database used to input its values

You can change the plain note of an invoice editing it directly inside the invoice

	Customer	Items	Bottom Note	Private No	ote
Q• Search					
Body Notes					
Custom ca	ake				
Found 1 / 1	Total				
Custom cak		5 USD			
Special ingr Special pres	edients	10 USD			
Special box	paration	3 USD			
Close					Incort Dodu
Close					Insert Body

You can use the upper search field to filter in the list the content of the plain items to insert

Inserting a pre-made tabled Item inside the goods and service section of an invoice

You can insert tabled items in an invoice of 'Tabled Items' type. You can insert tabled items pressing the '+' button at the bottom of the section table

Tabled items data are copied inside an invoice, not linked.

Further changes in the items are not mirrored inside the invoice using these items. So the invoice maintains it's state over time also if you update the database used to input its values

Note that the input dialog as a bottom area where you can change values on the fly before inserting them

Invoices will display the default values.

You can adjust Sell price, Quantity and discount for any item before inserting it.

	Customer	Items	Bottom Note	Private Not	e
Q All					
A					
Code		Name			
1		Sultana			
2 3		Tiramis Aranyga			
4		Madeira			
5			and polenta cak	æ	
6		Birthda			
7		Gingert	oread		
8		Welsh o			
9		Punsch	krapfen		
Found 9 /	9 Total				
Cod	d 7				
Name	: Gingerbread	I			
Description	n: Gingerbread	l cake			
Note					
√ Available	9				
Sell Prid	ce: 14.00		(US\$)		
		. ^			
Quanti	ty:	1 🗘	(Qt)	Discount:	0,00 % 🗘
Close					Insert Item

You can use the filter area to filter the content inside the item list to better search items to insert.

	Customor	Itomo	Pottom Mate	Drivete Net	
	Customer	Items	Bottom Note	Private Note	
Q madei					
Code		Name			
4		Madeira	a cake		
Found 1 / 9	Total				
Cod					
	Madeira cal				
Description:	Madeira cal	ke			
Note:					
√ Available					
Sell Price	e: 14.33		(US\$)		
		05			
Quantity	/:	25 🗘	(Qt)	Discount:	0,00 % 🗘
Close					Insert Item

After insertion of tabled item they can be modified inside the item table of the invoice

You can modify the values double clicking them directly inside the table in the invoice input area

Goods and Se	rvices Tabled items ۞ Empty the c	ontent i	f you need	l to change i	nvoice typ	pe
# Code	Descr	MU	Qt	Price		Tot
17	Gingerbread cake	Qt	1.00	14.00	0,0	14.00
25	Orange and polenta cake	Qt	1.00	8.00	0,0	8.00
32	Tiramisu cake	Qt	1.00	9.00	0,0	9.00

This to give you the needed flexibility to manipulate your input

The Amount section

The amount section is probably the probably most important section because there are specified the money involved with the invoice, and after all this is what an invoice is about.

In case of goods and services specified as plain text you have to manually insert the total, even if you inserted the item from the pre-available text item list.

In case of tabled items the total amount is automatically calculated by Invoices in accordance of price and quantity of any item inserted in the invoice table.

Amount			
Currency Indicator US\$			
	Partial Amount	US\$	31.00
Tax 1 % 20	Tax 1 Tax 1	US\$	6.20
Tax 2 % 0	Tax 2 Tax 2	US\$	0
Change % Decimal Precision in % Field	Total Amount	US\$	37.20

The Amount section has also 2 optionally available rows for taxes (it depends of your country/state rules if you need to use it or not) You can enable or disable them in the 'Document Settings'

If you use them a percentage over the Partial Amount will be calculated and added to the total

You can insert that percentage manually for every invoices.

or you can use to have a default percentage automatically inserted for any new invoices

or you can also associate a percentage to insert for any invoice for any customer (inserting a customer will automatically set the percentage in the invoice) This last feature is useful when you have different tax applied to customer in your country or outside (almost always for business customer in Europe as example if they are in your country or not and you need to apply in the latest case 0% VAT)

The Bottom Note section

The bottom note will be displayed at the bottom of the printed invoice. It is typically used for instruction of payment or other note you may like to add to your invoices

Bottom Note	
Payment via Wire Transfer	
€2′ +	

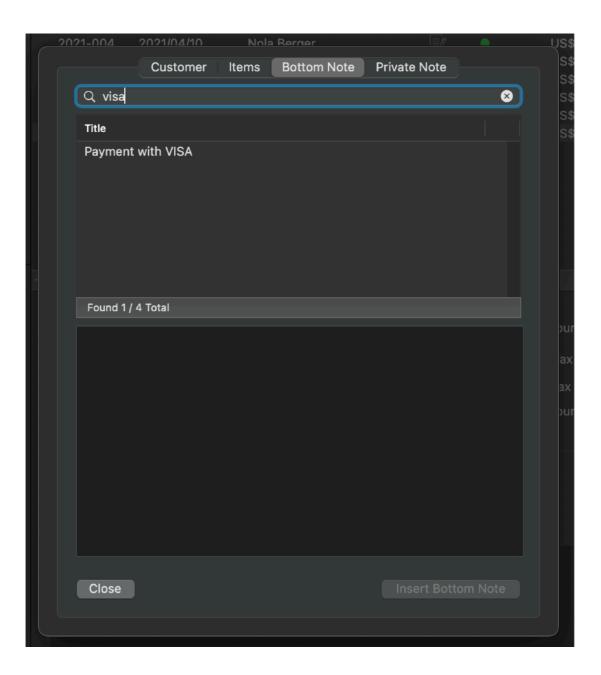
Inserting a pre-made bottom note in the bottom note section of an invoice

You can insert it directly editing it or inserting a pre-created one from the list pressing the '+' button at the bottom of the area

20'	21_004	2021/04/10	Nola	Rerner	<u> </u>		US\$
		Customer	ltems	Bottom Note	Private Note		S\$
							S\$
	Q Searc	h All					S\$
	Title						S\$ S\$ S\$ S\$
		via Wire Trans	fer				
		with VISA					
		via Cash					
	Payment	with Paypal					
	Found 41	4					
	Found 4 /						
	Payment v	ia Wire Transfer					pur
							ax
							ах
							bur
	Close				Insert Bo	ttom Note	

To insert a bottom note select it and press the 'Insert Bottom Note' button

You can use the filter area to filter the content inside the item list to better search bottom notes to insert.



Notes data are copied inside an invoice, not linked. If a note is changed in the list, the content of notes previously inserted inside the invoices will not change.

You can change the note area of an invoice editing it directly inside the invoice also after having it inserted via pre-made values

The Payment section

The payment section shows the effective payment date. You can set and change it at any time and specify an invoice as paid.

Paymen	t							
Paid	Payment Date:	20	21/(08/	08			
		Au						
		Мо	Tu	We	Th	Fr	Sa	Su
						30		
		2	3	4	5	6	7	8
		9	10	11	12	13	14	15
		16	17	18	19	20	21	22
		23	24	25	26	27	28	29
		30	31					

The Private Note section

The private note will not be displayed inside the printed invoice. It is a private note the customer receiving the invoice will never see

You can insert it directly editing it or inserting a pre-created one from the list pressing the '+' button at the bottom of the area

All very similar to the Bottom Notes The difference is private note are not visualized inside the invoice in the Invoice Form and they will never be printed inside the invoice you prepare for your customers.

Inserting a pre-made private note inside the private note section of an invoice

Inserting a private Note is similar to inserting a Bottom Note

Private notes data are copied inside an invoice, not linked. If a note is changed in the list, the content of private notes previously inserted inside the invoices will not change.

You can change the private note of an invoice editing it directly inside the invoice also after having it inserted via pre-made values

Recap of values you can edit directly inside the Invoice

Directly inside the invoice 'Input' pane you can also edit or change after insertion:

The number and the date of the invoice
Order N. and Track N.
Add and modify a Plain Item (goods and services in the invoice if of 'Plain Item' type)
Modify a tabled Item inserted in the invoice (Quantity and discount in the invoice if of 'Tabled Item' type)
Switch the invoice type from 'Plain Item' to 'Tabled Items' and vice-versa selecting the popup button. If any content is already inserted in the 'Items' area you need to empty it before switching type.
Currency indicator
Total of the invoice (if of 'Plain Item' type)
Tax applied to the invoice
Add and modify Bottom Note
Add and modify Private note
Edit the payed status and the 'Payment Date'
Due payment date

An invoice can be Locked clicking the Lock symbol. This to prevent unwanted modification in invoice already printed and sent to the customer

If you need to modify an invoice you need to unlock it if it is locked.

Maximum effect with minimum effort in inserting data inside a newly created invoice

To insert and fill all the section of an invoice you don't need to click in any invoice section '+' button and insert content from the dialog then close then click again '+' in another section and reopen.

You can open one time only the insert dialog and then change tab

2021-004	2021/04/10	Nola	Rerger		US
	Customer	Items	Bottom Note	Private Note	s
					S
Q Search					
Name & ID					l s

When you change tab the view of the invoice input scrolls to show you the area that will receive the input in case you press 'Insert'

So you can add Customer, Items, Bottom Note and Private Note in a single operation with just 4+4 clicks inside the same dialog and see in the window in the background the data entering the fields, as you click.

Toolbar

Invoices uses a standard Toolbar in the upper part of the window. It acts as any standard toolbar in a Cocoa modern Mac application. You can customize the toolbar in the standard way. Right Click or Control-Click on the toolbar and select "Customize Toolbar..."



Filtering content in the various views

When a view is selected in the [upper left] Selection Pane, using the controls below, in the [bottom left] Filter Pane the user can filter the elements that will be displayed in the Table Pane [upper-right]

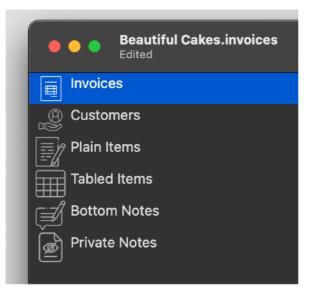
For the invoices view you will also see total of the filtered invoices.

© Customers	
Plain Items	
Tabled Items	
Bottom Notes	
Private Notes	
Show All	ł
Found 6 / 6 Total Year 2021	
Year 2021 C	
Name Q Search	
Payed All 📀	
Partial Amount 1,633.22	
Tax 1 177.30	
Tax 2 0	
 Total Amount 1,810.52	

Visualizing the Invoice in 'Preview' mode

The Preview mode shows the invoice in it's final state as it will be printed to be sent to your customers

To select the form mode: Select the invoice View on the left



then select the preview mode in the bottom right part of the invoice list

	[0]	Q	Ð

The form mode will be visualized:

 + - ··· ·· · · · · · · · · · · · · · · ·						
Invoice # 5/2021						
Date 2021/08/08					Tax ID #	‡1
Order N.					Track	N.
# Code 1 7 3 2 5	Descr Gingerbread cake Tiramisu cake Orange and polenta cake	MU Qt Qt Qt	Qt 1.00 1.00	Price 14.00 9.00 8.00	-% 0 0	Tot 14.00 9.00 8.00
		Partial Amount Tax 1 20 % Tax 2 0 % Total Amount		L	JS\$ JS\$ JS\$	31.00 6.20 0 37.20
Payment via Wire		- The Best in the Wor	Id			

You can zoom in or out using the two buttons at the right bottom of the invoice list near the 'Form mode' button (or from the toolbar)

As you can see all the data inserted in input mode is visualized inside the invoice form

Printing an invoice

Remember, that you need to select from the 'Page Setup' command under the File menu the page size you need.

Currently are supported the following format:

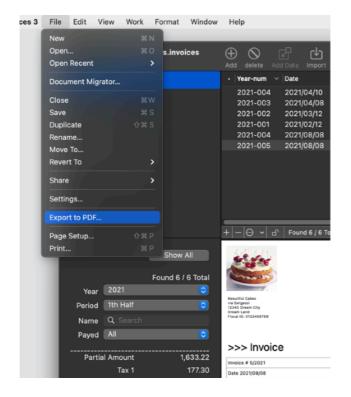
• A4

USA Letter

To print an invoice simply select the invoice you like to print from the invoice list then select Print from the File menu.

Exporting an invoice as PDF on disk

To export an invoice as PDF on disk select 'Export to PDF' under the file menu



a save dialog will open proposing a custom name deviated from the name of the document and the invoice used to export

	Save As: Beautiful Cakes 005-2021. Tags:	pdf	
	📄 Beautiful Cakes Demo	 ○ 	Q Search
BeautifulExport.tsv Beautifules.invoices			
New Folder			Cancel Save

The way the proposed name is builded can be changed in the preferences under the 'Advanced' tab:

Advanced	General	Label	1 Format	Advanced	() Update
File Name for Export to PDF: #T #N-#YY					-
Vse leading zero Invoice Number length: 3					#N #YY #Y
In this sample invoice number is 3 and Document title is I	DOC_TITLE				#M #D #T
					#T #N-#YY #N-#YY #N-#YY-M-D #T #N-#YY-M-D

Predefined tag are available to use various values:

```
#N : Number of invoices (with or without leading zeroes) - example 003
#YY : Long Year - example: 2018
#Y : Short Year (last 2 digits) - example: 18
#M : Month - example: 06
#D : Day of month - example : 15
#T : Name of the document (without extension)
```

plus some pre-made composited file name already built

In the lower part you get an example of the result you get with the title you built.

You can also create PDF file form the print dialog as in any application with print available.

In that case pre-built title will not be available.

Dark Appearance Mode

This application is also fully compatible with Light and Dark Appearance Mode. You can switch at any time from one mode to another

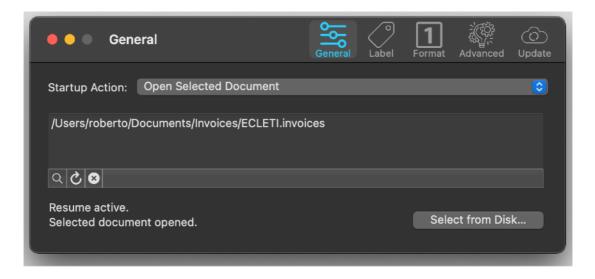
•••	Beautiful C Edited	akes.invoices	⊕ Add	(delete	Add Data	↓ Import	L Export	ہٰ ا ج Settings	[] Input	O Preview		In Zoom	Out
Invoid	es		• •	rear-num	→ Date		Cu	ustomer			Туре	Paid	Cu
Botto				2021-00 2021-00 2021-00 2021-00 2021-00 2021-00	3 2021 2 2021 1 2021 4 2021	/04/10 /04/08 /03/12 /02/12 /08/08 /08/08	El Br	ola Berger sa Lang ritney Burt erri Hardy		_		•	
		Show All	+ -	- 😳 🗸	් Four	nd 6 / 6 To	otal				Ľ	:: Q	Ð
					-								
	0001	Found 6 / 6 Total	10	and a	5								
Year	2021	٢	Beauti	tul Cakes	5								
Year Period	1th Half		via Sa 12345 Dream	rgassi Dream City Land	5								
		٢	via Sa 12345 Dream	rgassi Dream City	9								
Period	1th Half	٢	via Sa 12345 Dream	rgassi Dream City Land	9								
Period Name	1th Half Q Search	© ©	via Sa 12345 Dream Fiscal	rgassi Dream City Land									
Period Name Payed	1th Half Q Search	© © 1,633.22	via Sa 12345 Dream Fiscal	rgassi Dream City Land ID: 012345678									
Period Name Payed	1th Half Q Search All I Amount Tax 1	© ©	via Sa 12345 Dream Fiscal	rgassi Dream City Land ID: 012345678	oice						Tax ID	# 1	
Period Name Payed	1th Half Q Search All	© © 1,633.22	via Sa 12345 Dream Fiscal	rgassi Dream City Land ID: 012345678 >> Invo ce # 5/2021 2021/08/08	oice				MU	Qt Pric	Track		

Preferences

General

Specify the action to do at startup

- Standard Behavior to use auto-resume and all the latest features of MacOS
- 'Open Dialog if No Resume' to have the Open dialog opened if there are no files to auto-resume
- · Open Dialog Always to have the open dialog opened at startup in any case
- Open Selected Document to have the selected document opened in any case



At any successive relaunch Invoices will execute the option selected. The additional 3 buttons at the foot of the edit field let you:

- Show in the finder the selected file
- Test open the selected file as it will be done at the next application launch
- Clear the selection

Label

Specify the label to be used inside the invoices in the 'Input' area and in the 'Form' area

This let you create, print and send to your customers invoices containing only text written in your own language (all the written text inside your invoices is customizable with the labels you like in the way and language you like)

This area in the preferences is divided in two zones (using a tab control) The 'Generic' labels and the 'Tabled Items' label, used in the invoice using the 'Tabled Items' format for the goods an services description inside the invoice

🗕 🔵 💿 Label	General Label Format Advanced Update						
	Generic Tabled Items						
>>> Invoice	>>> Invoice						
Invoice #	Invoice #						
Date	Date						
Attention To	Attention To:						
Order N.	Order N.						
Track N. Put a space in field	Track N. s to use a blank label						
*Tax ID 1#	Tax ID # 1						
*Tax ID 2# Tax ID # 2 Use Tax ID 1# and Tax ID 2# in document setting according with your local tax law							
**Tax 1 %	Tax 1 %						
**Tax 2 % Tax 2 % Use Tax 1 % and Tax 2 % in document setting according with your local tax law							
Amount	Partial Amount						
**Tax 1	Tax 1						
**Tax 2	Tax 2						
Gran Total	Total Amount						

Format

This area let you specify the default currency used in your invoices, number format with decimal precision for currency values, decimal precision for percentage, date format and format used for invoices ID (year-number) to identify in a unique way any invoice.

🗕 🕘 💿 Format		General	Label	1 Format	Advanced	(j) Update		
Currency is defined inside Document Settings								
Number Format	1,234.56					\bigcirc		
Decimal Precision in % Field 💿 0 💿 1 💿 2 💿 3								
Date Format	2018/09/28					\bigcirc		
Table Year-Num Format	2018-003					٢		

Format

In the advanced tab you can specify how the suggested title for PDF to create exporting invoices is built

Advanced	General	Label	1 Format	Advanced	(j) Update		
File Name for Export to PDF:							
#T #N-#YY					~		
Use leading zero							
Invoice Number length: 3							
DOC_TITLE 003-2021							
In this sample invoice number is 3 and Document title is DOC_TITLE							

Please see above the 'Export an Invoice as PDF to Disk' section for more details

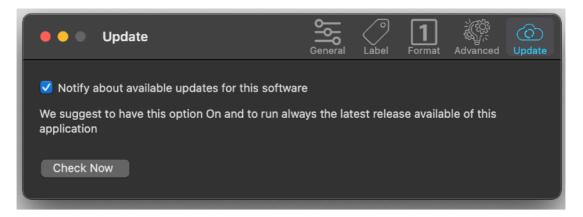
Update

If you get it from the Apple App Store:

Update section is not available in the App Store Release (if you purchased via the App Store, to obtain an update use the App Store Update function)

If you downloaded it from our site:

The download release of Invoices can inform you if an update is available. The application will check no more then once a day.



If you download the upgrade, you need to install it.

A common error is to download an upgrade and install it maintaining the old application somewhere on the hard disk.

Then using to open the documents sometime the old application and sometime the new one. This cause some problems*. To avoid it simply install your application in

the place dedicated to it, the Application folder. When you install an update on the standard Application folder, the system will ask if you want to replace the old one with the new, answering yes will install the new one replacing the old.

*If the application says the document you are trying to open was created with a newer version of the application, probably you have two different release of the application on your Hard Disk and you are trying to open a document with the older version after having modified the document with the new one. When you receive a similar message open the about box inside the application and see if you are running the last release. In case download it, install it and USE it!

Help

Invoices provides under the Help menu this User Guide in PDF format. It is enough to select the command to open it.

Under the help menu use the 'Web Site' command to access our site and download the very last version of Invoices and, if you like, other software for Mac we make.

Support

You can also obtain support using the 'Support Email...' command. An email will be prepared using your email client with the correct address to send to. Yes, we answer to your emails.

Invoices is a commercial application

If you get it from the Apple App Store:

In case of the App Store release a license is already included with your App Store purchase and you don't need to buy a license

If you downloaded it from our site:

You can use our software for a test period of 10 days After that you are required to buy a license to be legally authorized to continue to use our software

Licensing Invoices

If you get it from the Apple App Store:

In case of the App Store release a license If you purchased the App Store release, a license is already included with your App Store purchase and you don't need to buy another license

If you downloaded it from our site:

If you are using the download version from our site, you can buy a license to use our software using the 'Buy License' command under the Help menu.

You will open in your browser our license web page on our web site

From there you can buy a license to use the application using one of the payment service we provide. It easy, fast, and secure and all most important form of payment are accepted.

We carefully selected or international reseller to be sure the buying experience for our customer will be as best as possible and without any problems. After purchase you will receive from Tension Software a license email containing your full license code

Open the License dialog with the command 'license' under the 'Invoices' menu and insert your license code. The software will become fully licensed and fully enabled for future use.

Name and license code are remembered by the program and don't need to be reinserted at successive launches.

In case you move on a new Mac you need to re-insert your name and license The license is valid for a single Macintosh. You can purchase for two Mac as long as they are not used at the same time, as example a desktop and a laptop used by the same user.

App Store Feedback

If you like this application please put a feedback on the App Store. It is very important to us. Thank you.

About Tension Software and Ecleti

All the software asset by Tension Software is now under Ecleti New company name but still the same owner and main developer (Roberto Panetta) So for the users nothing changes. We provide the same software and the services. All the user licenses are valid and assistance is provided as before to all our users.